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**Date: May 27, 2011****Broadcast Bulletin: B 11-04**

To: Energy Service Providers

Subject: Dwelling Assessment Form (CSD 540), Weatherization Mold/Moisture Assessment and Release Form (new CSD 540A), Other Records, and Extension of Time to Submit Contractor Equivalent Requests

The purpose of this broadcast is to provide information on revised forms CSD 540 and (new) CSD 540A, describe other records and documentation necessary to be kept that are not part of the assessment, and provide notice of the extended deadline for submitting contractor equivalent form requests to CSD.

Updated May 6, 2011 the **CSD Dwelling Assessment Form** and **Weatherization Mold/Moisture Assessment and Release Form** are available for down load at the CSD web site under the Energy tab, CSD Energy Forms. To assist service providers in understanding the intent and purpose and assist in the use of the updated forms the following information is provided.

CSD Dwelling Assessment Form (CSD 540)

This form is to be used to assist in the performance of the necessary comprehensive dwelling assessment and aid in documenting conditions in a concise, accurate, and thorough manner prior to the provision of weatherization services. Attachment of photographs and supplementary documentation described in the CSD 540 is essential to record weatherization measures consistently and to aid in client file review by the service provider, CSD, and other governmental agencies.

Other Records

The CSD 540 is not to be used as a replacement for, but rather is to be supplemented by, separate time logs for all weatherization workers including, but not limited to, assessors, inspectors and auditors. Time logs must indicate the worker's name, brief description of work performed, time in, time out, and total hours worked. Time logs are required data.

The CSD 540 is not for tracking material purchase, material inventory, or material used on a job. Additionally, documentation for minor envelope repair (MER) must be used to specifically describe the work performed and material used. These are required data.

The service provider is advised to develop separate documents for time log, material management, and MER purposes described above and, while CSD will review any documents if requested for format advice, these documents are not considered part of the dwelling assessment.

Weatherization Mold/Moisture Assessment and Release Form (new)(CSD 540A)

This is a new form developed to meet requirements issued by the federal Department of Energy. The CSD 540A should be used immediately.

Extension of Time to Request Contractor Equivalent Approval

Since the information contained in the CSD 540 is detailed, CSD recognizes that service providers who desire to have approved a contractor equivalent for this form may need additional time to develop their request. Therefore, the time to file a request for contractor equivalent approval of the dwelling assessment form is extended to June 30, 2011. (Refer to May 24, 2011 EP 11-04, Approval of Contractor Equivalent Form.)

Service providers wishing to request contractor equivalent approval for the CSD 540 may request an editable version of the form by contacting CSD at Wx@csd.ca.gov.